



Texas Department of  
**Family and Protective Services**

Determine and Re-determine Eligibility  
for a  
Federal Foster Care Assistance  
Maintenance Payment

In IMPACT 2.0

Job Aid

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# “New Using” Functionality for Foster Care Applications and Reviews – Overview

IMPACT 2.0 has just made the processes for **Foster Care Applications** and **Foster Care Reviews** a lot easier!

With the addition of the **New Using** functionality, authorized CPI and CPS staff, and, and Foster Care (FC) Eligibility Specialists can create new applications or reviews prefilled with Information from an existing application in Approved (APRV) status or an existing review in Completed (COMP) status.

Also, in certain situations, a new **Staff To-Do** task alerts FC Eligibility Specialists whenever a child’s placement type changes from one Non-FPS Paid placement to another Non-FPS Paid placement.

## “New Using” Button on Foster Care Application List Page

The **New Using** button on the **Foster Care Applications List** page allows authorized CPI and CPS staff, and FC Eligibility Specialists to launch a new **Foster Care Application** using information duplicated (prefilled) from the information of an existing application selected from the application list. The new application can only be created from an existing application with a status of Approved (“APRV”).

**Stages Impacted:** SUB

## Foster Care Application List Page – How to Get There



Follow these steps to locate the **Foster Care Application List** page:

1. From the **Assigned Workload** page in the **My Tasks** tab, select a **SUB Stage Name** hyperlink for a case.

The screenshot shows the 'My Tasks' page with the 'Assigned Workload' section highlighted. The table below shows the workload entries:

SS	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
			S				SUB	REG	04/25/2012	07/11/2018	01	C4			CPS

- You will arrive at the **Case Summary** page.
- Select **Foster Care Eligibility** on the secondary menu.

**Case Summary**

Case Name: [Redacted] \* required field  
‡ conditionally required field

**Attention:**  
 You are currently in the [Redacted] SUB stage

**Case Information**

Case ID: [Redacted]      Region: 01  
 Status: Open      Start Date of Case: 04/19/2012

Show 10 entries

Mrg	M-Ref	Stage Name	Stg	Type	Opened	Time	Closed	Primary	Reg	Stage ID	Ov Dsp	Phone
○	[Redacted]	[Redacted]	PAL	REG	09/07/2018			[Redacted]	01	[Redacted]		[Redacted]
○	[Redacted]	[Redacted]	ADO	REG	09/19/2014		06/17/2016	[Redacted]	01	[Redacted]		[Redacted]

- You will arrive at the **Eligibility Summary List** page.

**Eligibility Summary List**

Stage Name: [Redacted] # Submitted Events

Case ID: [Redacted]

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
09/18/2018	PROC	Foster Care Eligibility	Title IV-E Start 09/17/2018	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
09/13/2018	COMP	Foster Care Eligibility	MAO Start 09/11/2018 End 09/17/2018	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
08/03/2018	COMP	Foster Care Eligibility	Title IV-E Start 07/24/2018 End 09/11/2018	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
04/03/2018	COMP	Foster Care Eligibility	MAO Start 04/03/2018 End 07/24/2018	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
04/02/2018	COMP	Foster Care Eligibility	MAO Start 03/29/2018 End 04/03/2018	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
07/05/2017	COMP	Foster Care Eligibility	Title IV-E Start 06/29/2017 End 03/29/2018	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
06/22/2017	COMP	Foster Care Eligibility	MAO Start 06/19/2017 End 06/29/2017	SUB	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

5. Select **Application** from the tertiary menu.
6. You will arrive at the **Foster Care Application List** page.

Eligibility Summary **Application** FC Review

### Foster Care Application List

Stage Name: # Submitted Events

Case ID:

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By
12/20/2018	COMP	Foster Care Application	Application Reviewed.	SUB				
12/03/2018	PROC	Foster Care Application	Application has been opened but has not been saved.	SUB				
12/03/2018	PROC	Foster Care Application	Application has been opened but has not been saved.	SUB				
11/30/2018	NEW	Foster Care Application	Application has been opened but has not been saved.	SUB				
11/30/2018	PROC	Foster Care Application	Application has been opened but has not been saved.	SUB				
10/29/2018	PEND	Foster Care Application	Application has been submitted to the Eligibility Specialist for review.	SUB				
<input type="radio"/> 04/09/2013	APRV	Foster Care Application	Eligibility Determination Completed.	SUB				
<input type="radio"/> 05/03/2012	APRV	Foster Care Application	Eligibility Determination Completed.	SUB				

## Foster Care Application List Page – Using the “New Using” Button

1. Select the radio button next to the existing review in Approved (“APRV”) status you wish to duplicate.
2. Select the **New Using** button.

Eligibility Summary **Application** FC Review

### Foster Care Application List

Stage Name: # Submitted Events

Case ID:

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
10/29/2018	NEW	Foster Care Application	Application has been opened but has not been saved.	SUB					
10/23/2018	PEND	Foster Care Application	Application has been submitted to the Eligibility Specialist for review.	SUB					
10/23/2018	PROC	Foster Care Application	Application has been opened but has not been saved.	SUB					
<input checked="" type="radio"/> 12/14/2017	APRV	Foster Care Application	Eligibility Determination Completed.	SUB					

Showing entries

Page < >

**New Using** Add

Reports: [dropdown] Launch



**Note:** If you do not select the radio button next to the existing application in "APRV" status on the List page before selecting the **New Using** button, you will receive an error message instructing you to do so.

Message from webpage

A Foster Care Application in "APRV" Status must be selected for New Using. Please select the appropriate Radio Button.

OK

**Foster Care Application List**

Stage Name: [redacted]  
Case ID: [redacted]

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
11/28/2018	PROC	Foster Care Application	Application has been opened but has not been saved.	SUB	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
11/28/2018	PROC	Foster Care Application	Application has been opened but has not been saved.	SUB	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
10/23/2018	COMP	Foster Care Application	Application has been submitted to the Eligibility Specialist for review.	SUB	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
<input checked="" type="radio"/>	08/30/2017	APRV	Foster Care Application	Eligibility Determination Completed.	SUB	[redacted]	[redacted]	[redacted]	[redacted]

Showing 11 to 14 of 14 entries

Page 2 of 2

New Using Add

Reports

Reports: [dropdown] Launch

## Foster Care Applications Created with "New Using" Button

When a new Foster Care Application is created, information from the selected FC application prefills corresponding designated fields in the new Foster Care application. Fields designated for prefill occur in four pages of the new Foster Care Application. Those pages are:

- App/Background
- Age/Citizen
- Domicile
- Income/Expenditures

The fields on these four pages that were editable in the legacy system remain editable in IMPACT 2.0. The system will prefill the fields for the current primary worker and the child's current placement, which cannot be edited.

# Income and Resources – Editing the Effective Dates

In the **Income and Resources** section on an individual’s **Person Detail** page, authorized CPI and CPS staff, and FC Eligibility Specialists have the ability to enter dates in both the **Effective From** field, and in the **Effective To** field. These updates will display on the new application.

The screenshot shows the 'Income and Resources' form. The 'Effective From' field is set to 01/16/2019 and the 'Effective To' field is set to 01/02/2019. The form also includes fields for Name, Person ID, Type (Income/Resource), Amount/Value, Verify Method, Source, and Monthly Income. There are 'Delete' and 'Save' buttons at the bottom.



**Note:** You will receive an error message if:

- You attempt to enter an income/resource entry of the same type as the current entry, where the current entry **Effective To** date is blank, or
- You attempt to enter an income/resource entry of the same type as the current entry, where the new entry **Effective From** date is earlier than the current entry **Effective To** date.

The error message reads: "An Income/Resource of the same type with an overlapping period exists."

The screenshot shows the 'Income and Resources' form with an error message. The error message is highlighted in a red box and reads: "Your information contains 1 error(s) - An Income/Resource of the same type with an overlapping period exists." The form fields are the same as in the previous screenshot, but the 'Effective From' and 'Effective To' dates are different (03/02/2017 and blank). There is a 'Save' button at the bottom.

# Application Completion and Submission Process Remains Unchanged

Update and edit other modifiable prefilled sections as necessary. (**App/Background, Age/Citizen, Domicile** and **Income/Expenditures**). Note that the Income for Child, Income for Family, Resources for Child, and Resources for Family fields in the Income and Expenditures page are editable.



**Note:** The completion and submission processes for the **Foster Care Application** remain unchanged where the new application must be submitted to the FC Specialist to finalize the application.

My Tasks Case Search Reports Resources

Case Summary Person Contacts/Summaries Service Authorization Legal Child Plans Placement History Medical Foster Care Eligibility PCA ICPC Case Management

App/Background Age/Citizen Domicile Income/Expenditures

### Application and Background

Stage Name: [redacted] \* required field  
‡ conditionally required field

Status  
 Application  Reapplication Expand All Collapse All

Child Information  
Child's Name: [redacted] Date of Birth: [redacted]  
Social Security Number: [redacted] Medicaid Number: [redacted]  
Person ID: [redacted] Detail

Address of Home of Removal  
Street 1: [redacted] Street 2: [redacted]  
City: [redacted] State: [redacted]   
County: [redacted] Zip: [redacted] - [redacted]

Are copies of all [redacted] verified with citizens and State [redacted] res

‡ Date: 08/24/2017

‡ Comments:

Have all legal documents been sent to the Eligibility Specialist including the Affidavit, Petition, and Court Order?  Yes  No

‡ Comments:

Referral for Child Support to Attorney General's Office  
Was child support court ordered to be paid to FPS?  Yes  No

Worker Information  
Worker's Name: [redacted] Worker's Phone: [redacted]

# Foster Care Review List Page – The “New Using” Button

The **New Using** button on the **Foster Care Review List** page allows authorized CVS staff and FC Eligibility Specialists to launch a new **Foster Care Review** using information duplicated (prefilled) from the information of an existing review selected from the review list. The new review can be created from existing reviews that have a status of “COMP”.

**Stages Impacted:** SUB

## Foster Care Review List Page – How to Get There



Follow these steps to locate the **Foster Care Review List** page:

1. From your **Assigned Workload** page in the **My Tasks** tab, select the **SUB Stage Name** hyperlink for a case.

SS	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
			S				SUB	REG	04/25/2012	07/11/2018	01	C4			CPS

3. You will arrive at the **Case Summary** page.
4. Select **Foster Care Eligibility** from the secondary menu.

Mrg	M-Ref	Stage Name	Stg	Type	Opened	Time	Closed	Primary	Reg	Stage ID	Ov Dsp	Phone
			PAL	REG	09/07/2018				01			
			ADD	REG	09/19/2014		06/17/2016		01			

5. You will arrive at the **Eligibility Summary List** page.

Case Summary

Person

Contacts/Summaries

Service Authorization

Legal

Child Plans

Placement

History

Medical

**Foster Care Eligibility**

PCA

ICPC

Case Management

Eligibility Summary Application FC Review

**Eligibility Summary List**

Stage Name: # Submitted Events

Case ID:

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
08/20/2018	PROC	Foster Care Eligibility	State-Paid Start 08/01/2018	SUB					
06/08/2018	COMP	Foster Care Eligibility	State-Paid Start 06/07/2018 End 08/01/2018	SUB					
10/26/2017	COMP	Foster Care Eligibility	MAO Start 10/26/2017 End 06/07/2018	SUB					
08/30/2017	COMP	Foster Care Eligibility	MAO Start 08/18/2017 End 10/26/2017	SUB					
08/19/2017	COMP	Foster Care Eligibility	MAO Start 08/18/2017 End 08/18/2017	SUB					

Showing 1 to 5 of 5 entries

Reports

Reports: Launch

6. Select **FC Review** on the tertiary menu.

7. You will arrive at the **Foster Care Review List** page.

Case Summary

Person

Contacts/Summaries

Service Authorization

Legal

Child Plans

Placement

History

Medical

**Foster Care Eligibility**

PCA

ICPC

Case Management

Eligibility Summary Application **FC Review**

**Foster Care Review List**

Stage Name: # Submitted Events

Case ID:

Show 10 entries

Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
12/26/2018	NEW	Foster Care Review	FC Review has been opened but has not been saved.	SUB					
04/03/2018	COMP	Foster Care Review	FC Review Approved.	SUB					
04/03/2017	COMP	Foster Care Review	FC Review Approved.	SUB					
04/14/2016	COMP	Foster Care Review	FC Review Approved.	SUB					
04/02/2015	COMP	Foster Care Review	FC Review Approved.	SUB					
04/08/2014	COMP	Foster Care Review	FC Review Approved.	SUB					
04/04/2013	COMP	Foster Care Review	FC Review Approved.	SUB					

Reports

Reports: Launch

# Foster Care Review List Page – Using the “New Using” Button

1. Select the radio button next to the existing review in “COMP” status you wish to duplicate.
2. Select the **New Using** button.

The screenshot shows the 'Foster Care Review List' page. The 'FC Review' tab is selected. The table below shows a list of reviews. The first row, dated 04/03/2018, is highlighted with a red border. The 'New Using' button at the bottom right is also circled in red.

	Date Entered	Status	Type	Description	Stage	Stage Name	Case ID	Person	Entered By	Event ID
<input checked="" type="radio"/>	04/03/2018	COMP	Foster Care Review	FC Review Approved.	SUB					
<input type="radio"/>	04/03/2017	COMP	Foster Care Review	FC Review Approved.	SUB					
<input type="radio"/>	04/14/2016	COMP	Foster Care Review	FC Review Approved.	SUB					
<input type="radio"/>	04/02/2015	COMP	Foster Care Review	FC Review Approved.	SUB					
<input type="radio"/>	04/08/2014	COMP	Foster Care Review	FC Review Approved.	SUB					
<input type="radio"/>	04/04/2013	COMP	Foster Care Review	FC Review Approved.	SUB					



**Note:** Failure to select the radio button of an existing review before selecting the **New Using** button will trigger an error message instructing you to select an existing review first.)

The screenshot shows the same 'Foster Care Review List' page, but with an error message dialog box overlaid. The dialog box contains a yellow warning icon and the text: "A Foster Care Review in 'COMP' Status must be selected for New Using. Please select the appropriate Radio button." The 'OK' button is visible at the bottom of the dialog.

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## About Foster Care Reviews Created with "New Using" Button

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In a new **Foster Care Review**, the following fields will be prefilled and are view-only:

- **Child Information**
- **Worker Information – Current Primary Worker on the Sub-Stage**
- **Placement – *Current placement only***

The following fields will also prefill but can be edited:

- **Close Foster Care Review**
- **Income for Child**
- **Resources for Child**
- **Child's Citizenship/Alien Status**
- **Method of Verification**
- **Judicial Determinations**
- **Extended Foster Care\***



**Note:** *Extended Foster Care* questions will prefill and can be edited ONLY if child is 18 at the time the new review is created.

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## Income and Resources – Editing the Effective Dates

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In the **Income and Resources** section on an individual's **Person Detail** page, authorized CVS staff and FC Eligibility Specialists have the ability to enter dates in both the **Effective From** field, and in the **Effective To** field. These updates will display on the new review.



**Note:** *You will receive an error message if:*

- You attempt to enter an income/resource entry of the same type of the current entry, where the current entry **Effective To** date is blank, or*
- You attempt to enter an income/resource entry of the same type of the current entry, where the new entry **Effective From** date is earlier than the current entry **Effective To** date.*

*The error message reads: "An Income/Resource of the same type with an overlapping period exists."*

# Process for Completing and Submitting a Foster Care Review Remains Unchanged

Update and edit other modifiable prefilled sections on the review as necessary.

- Close Foster Care Review
- Income for Child
- Resources for Child
- Child's Citizenship/Alien Status
- Method of Verification
- Judicial Determinations
- Extended Foster Care\*



**Note:** *Extended Foster Care* questions will prefill and can be edited ONLY if child 18 at the time the new review is created.

Name	Type	Amount	Source	No Income	Count/Personal	Count/Allowance
Business/Childcare		\$0.00		<input type="checkbox"/>	<input type="radio"/> Personal <input type="radio"/> Personal	<input type="radio"/> Countable <input type="radio"/> Exempt

Name	Type	Amount	Source	Verification Method	Income/Allowance	Count/Allowance
Business/Childcare		\$0.00			Yes	<input type="radio"/> Countable <input type="radio"/> Exempt



**Note:** *The completion and submission processes for the Foster Care Review remain unchanged where the new review must be submitted to the FC Eligibility Specialist to finalize the review.*

# For FC Eligibility Specialists Only – Task Generated by Change in Placement Type

Whereas legacy IMPACT would **not** trigger a **To-Do Task** (*Eligibility Action due to change in placement type*) for the FC Eligibility Specialists if the child did not have active eligibility when there was a change in placement type, *that has changed in IMPACT 2.0*.

IMPACT 2.0 will now generate a **To-Do Task** (*Eligibility Action due to change in placement type*) for the FC Eligibility Specialists when there is a placement change between **Non-FPS Paid** placement types, and one of the placements has a **Living Arrangement** listed below.

- **City County Jail/TDC**
- **Other Juv. Det.**
- **TYC Halfway House**
- **TYC Institution**



**Note:** This applies even when there is no active eligibility.

**Stages Impacted:** SUB

## What Triggers the Eligibility Action Task on Staff-To-Do?

FC Eligibility Specialists need to follow these steps to view the **Staff To-Do** task, and recognize what triggers the task. The new functionality creates a to-do when the placement changes from a Non-FPS Paid placement with a "City County Jail/TDC", "Other Juv. Det.", "TYC Halfway House", or "TYC Institution" living arrangement type to another Non-FPS Paid placement with a living arrangement that is not one of these types and vice-versa.

From your **Assigned Workload** in the **My Tasks** tab, select the **Staff-To-Do List** on the secondary menu.

The screenshot shows the 'My Tasks' tab in the IMPACT 2.0 system. The 'Assigned Workload' section is active, displaying a table of workload items. The table has columns for SS, WS, Hr, P/S, M-Ref, Stage Name, County, Stage, Type, Opened, Assigned, Region, Unit, Stage ID, Case ID, and PGM. One row is highlighted in red, indicating the selected item.

SS	WS	Hr	P/S	M-Ref	Stage Name	County	Stage	Type	Opened	Assigned	Region	Unit	Stage ID	Case ID	PGM
			S				SUB	REG	04/25/2012	07/11/2018	01	C4			CPS

Select the hyperlink for the task, which will redirect you to the **Eligibility Summary** page.

My Tasks Case Search Reports Resources

Workload  
**Staff To-Do List**  
Unit Summary  
Unit Maintenance

### Staff To-Do List

Search Criteria

From: 11/06/2018 To:

Show 10 entries

Type	Date	Stage Name	Created By	Description
<input type="checkbox"/>	Task	11/06/2018	SYSTEM	Eligibility action needed due to change in placement type effective 10/01/2018.
<input type="checkbox"/>	Task	11/06/2018	SYSTEM	Eligibility action needed due to change in placement type effective 10/01/2018.

Showing 1 to 2 of 2 entries

Reports

Reports: